


































Appendix A: CRIS Toolbar Icons




Icons on the Patient List Screen	
 Patient List	Displays the Patient List from other tabs within the patient chart, from which you view status information for all your patients, and from which you can select a patient to view more detailed information.
 Previous Patient	Displays the chart of the previous patient selected in the Patient List . This icon is only highlighted if you have selected multiple patients, and if you are not presently viewing the first patient in the group. When you click Previous Patient , you remain in the same chart section, but switch to the record for the previous patient in the Patient List .
 Next Patient	Displays the chart of the next patient selected in the Patient List . This icon is only highlighted if you have selected multiple patients, and if you are not presently viewing the last patient in the group. When you click Next Patient , you remain in the same chart section, but switch to the record for the next patient in the Patient List .
 Refresh Screen	Updates the current view . You can also choose Refresh Screen from the View menu. It is recommended that you refresh the screen often, to make sure that the current view displays the most current information.
 Order Entry Worksheet/Enter Order	Both icons open the Order Entry Worksheet . The icon on the left opens a blank worksheet. The icon on the right indicates that there are unsubmitted orders.
 Find Patient	Opens the Find Patient dialog box, allowing you to search for a specific patient by name, ID, Visit ID, facility, location, or provider. After you have found a patient, you can show all visits for that patient and create a special or temporary list.
 Find Visit	Opens the Find Visit dialog box, allowing you to search for a specific patient by name, ID, Visit ID, facility, location, or provider. You can use the Find Visit dialog box to create a list of multiple patients that meet certain criteria - for example, all patients of a certain care provider who were admitted between specified dates.

 <p>Document Entry Worksheet/Enter Document</p>	<p>Both icons open the Document Entry Worksheet. The icon on the left opens a blank worksheet. The icon on the right indicates that there are unsubmitted documents.</p>
 <p>Enter Health Issue</p>	<p>Opens the Health Issue Details dialog box, allowing you to enter a new diagnosis or health issue for a patient.</p>
 <p>Clinical Path Manager</p>	<p>Opens the Clinical Path Manager, allowing you to initiate and review clinical paths outside of order entry.</p>
 <p>Worklist Manager</p>	<p>Opens the Worklist Manager, allowing you to view a list of tasks that need to be performed for a patient or list of patients, and to indicate which tasks have been completed within a particular time frame.</p>
 <p>Task Viewer</p>	<p>Opens the Task Viewer, allowing you to view a history of task completion for multiple orders for the currently active patient.</p>
 <p>Flowsheet Manager</p>	<p>Opens the Flowsheet Manager. The Flowsheet Manager looks and works exactly like the Observations chart section, however you cannot access the main window controls (for example, the menus and toolbar).</p>
 <p>Print Reports</p>	<p>Opens the Report Selection dialog box, allowing you to view and/or print reports.</p>
 <p>Add Care Provider</p>	<p>Opens the Care Provider Details dialog box, allowing you to add yourself or someone else as a care provider for a selected patient. Once a chart is opened, this icon is accessible from all chart sections.</p>
 <p>Temporary Location/Bed Status</p>	<p>Opens the Temporary Locations dialog box, allowing you to assign and clear temporary locations, view a history of all locations to which the patient has been assigned during this visit, or only their temporary locations, and assign bed status</p>








 More Header Info	Opens the Expanded Header , allowing you to view more detailed demographic information than is displayed in the standard Patient Header .
 Remove Patient	Removes selected patients from the Patient List .
 Sort List	Opens the List Sort Criteria dialog box, allowing you to sort the patients in the Patient List according to criteria such as name location, admit date and time, and visit status.
 Save Time Scale	Saves the time scale for the selected patient. Each subsequent time you display results for this patient, the saved time scale is used. You can change the time scale using the Modify Time Scale command on the Actions menu.
 Logoff	Logs you off of CRIS and opens the Logon dialog box.

Appendix B: CRIS Chart Section Icons

Icons in the Results Chart Section	
	Denotes a test result as High Abnormal .
	Denotes a test result as Low Abnormal .
	Denotes a test result as High Critical (abnormally very high) .
	Denotes a test result as Low Critical (abnormally very low) .
	Indicates that a result has been modified. Click the icon to open the Updated Results window.
	Indicates that a text result has additional text that is undisplayed. Click the icon to open the Expanded Results window.
Icons in the Orders Chart Section	
	Indicates that the view has been filtered and displays above the Display Window.
	Indicates an order set in the Requested by or Requested by Details views.
	Indicates a Hold order (Future Outpt/Pre-Admit).
	Indicates a Take Home Medication order.
	Indicates a Suspended order
	Indicates a Conditional order



	Indicates a Master Repeat order
	Indicates a repeat occurrence
	Indicates that the order has been modified.







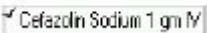

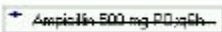





Icons in the Documents Chart Section

	The Enter Document icon opens a blank Document Entry Worksheet , allowing you to enter a document. You can also access the Document Entry Worksheet from the GoTo menu.
	The Enter Document icon changes to indicate that there are unsubmitted documents.
	The Flowsheet Manager icon opens the Flowsheet Manager , allowing you to chart observation parameters using the shortcut menu.
	The Filter icon indicates that the view has been filtered.
	The Modified icon indicates that the document has been edited.
	The Unsigned icon indicates that the document is unsigned.
	The Canceled icon indicates that the document has been canceled.







Icons in the Observations (Flowsheet) Chart Section

Each cell on a flowsheet can display icons indicating what kind of data exists for that observation parameter cell.

	Indicates the cell has been edited.
	Comments exist

Worklist Manager Icons and Cell Colors (Med Charting)	
	Worklist Manager icon.
Pending/Yellow 	Indicates a pending Scheduled task.
Pending/Blue 	Indicates a pending Manual Schedule task. This task must first be scheduled using the Create Schedule dialog box before it can be marked as done.
Pending/Purple 	Indicates a pending Conditional task. If the order can be activated more than once, the Conditional task remains purple with the question mark. When there are no more orders to activate, the Conditional task turns white and displays with a questions mark.
Pending/Red 	Indicates that a task has not been documented as performed or not performed within a facility-defined time frame that can vary by task type, or that a task is Overdue. The task description is also displayed as red if one occurrence is overdue.
	Indicates a comment has been entered for the task.
Complete/White 	Indicates a task has been performed
Not Performed/White 	Indicates a task was marked as not performed.
Canceled/White 	Indicates the task has been canceled because the order was canceled, discontinued or suspended
	Mark as Done Icon
Cyan bar 	Indicates a continuous task. When you chart as done, the solid bar disappears up to the documentation time.
Yellow trough 	Indicates the tasks that were placed after a scheduled time. The trough allows for documentation during the (trough) time frame.
Yellow bar 	Indicates a start when first given task based on the first task occurrence.
Magenta trough 	Indicates a PRN task.

Appendix C: Windows Navigation

GUI Actions Using a Mouse		
Term	Mouse Action	Result
Single Click	Move the mouse pointer to a screen selection item and click the left mouse button.	Selects the item or performs an action.
Double-click	Move the mouse pointer to a screen selection item and click the left mouse button twice in rapid succession.	Performs an action (e.g., opens an information screen).
Drag and drop	Click-and-hold the left mouse button on an object to move (drag) it to a new location; release the mouse button to drop the object.	Moves a selected object to a new location on the screen (e.g., to the archives).
Scrolling	<p><i>Vertical scroll bar</i></p> <ul style="list-style-type: none"> •  Click on the arrows to scroll one line at a time. •  Click or click-and-hold the down arrow to scroll downward. •  Click or click-and-hold the up arrow to scroll upward. •  Click on either side of the scroll box to move one page. <ul style="list-style-type: none"> – Click below the scroll box to move down one page. – Click above the scroll box to move up one page. <p><i>Vertical scroll bar (cont'd)</i></p> <ul style="list-style-type: none"> •  Drag the scroll box to an approximate location. <p><i>Horizontal scroll bar</i></p> <ul style="list-style-type: none"> •  Click on the right or left arrows to view additional information. 	Some screens display vertical and horizontal bars, which allow you to view longer or wider lists of data, displayed in a window.
Shortcut Menu (Right Mouse Click)	Move the mouse pointer to a screen selection item and click the right mouse button.	Shortcut menu, listing options to perform a particular function. Similar to selecting from the Menu bar.

Other GUI Actions		
Term	Action	Result
Menu Bar	Place cursor on word on menu bar and single click OR hold Alt key and press underlined letter in menu option (ie Alt F to open File drop down menu)	Selected drop down menu will open to allow for further selection.
Drop Down Menus	Once the drop down menu is opened (see above), move cursor to highlight desired option and single click OR use up and down arrows to highlight desired selection and press the Enter key	Selected option will process.
Tool Bar	Place cursor over selected button and single click	Selected option will process.
Radio Buttons	Place cursor over selected box and single click	Button will be selected (filled-in)
Checkbox	Place cursor over selected button on Tool Bar and single click	Checkbox will be selected (filled-in)
Status Bar	Requires no specific keystroke or mouse click. User looks at the bottom of window.	The bar at the bottom of the document window that displays information about a command or toolbar button, an operation in progress, or the location of the insertion point.
Help (F1)	Press the F1 key on the keyboard	The Help dialogue box will open.
Help Button	Single click on the Help Button (on the Tool Bar)	The Help dialogue box will open.
Help (Menu)	Single click on the Help menu on the Menu Bar OR press the Alt key and press H.	The Help dialogue box will open.
Minimize Windows	Click on the (–) Box in the upper right corner of a window.	Reduces an application or document window to an icon on the taskbar. To restore the window to its previous size and location, click the application icon on the taskbar
Maximize/Restore Windows	Click on the (□) box in the upper right corner of a window to maximize OR click on the (🖥️) in the upper right corner of a window to restore.	Maximizing enlarges a window to its fullest screen capacity and restoring a window returns the screen to its previous size before it was maximized.

Other GUI Actions		
Term	Action	Result
Closing Windows	Click on the (X) box in the upper right position OR Click on File (on the menu bar) and click on Close.	The window will close. If appropriate, you will be prompted to save data.
Keyboard Shortcuts - Menus	Open menus using the Alt key and the underlined letter. To move within the open menu, use the up and down arrow keys. To select an option (highlight), press enter.	Open menus without using the mouse
Keyboard Shortcuts – open window	The Tab key will move from field to field and from button to button in open windows. Use the up and down arrows to select options in drop-down fields. To select an option (highlight), press enter.	Select options in a window without using the mouse.

Windows conventions apply to windows in CRIS:

- ☐ You can cut, copy, and paste within and between order forms
- ☐ You can resize most windows
- ☐ You can highlight a group of orders or documents, etc. by
 - ☐ Click first, holding shift key down, clicking last
 - ☐ Hold control key down, click on individual orders

Appendix D: Tips and Troubleshooting

Refresh

Clicking the **Refresh** icon insures that any new data that has been recorded will be displayed.

For MAC Users

To 'right-click' with a one button MAC mouse, do the following:
Hold the Ctrl key and click with the mouse (Ctrl-Click).

Scroll Wheel Mouse

When using the scroll wheel mouse, the current field (highlighted in blue) will change as you scroll. In the order entry function, this can change your section in the order form instead of moving down the form. Care should be taken when using the scroll wheel mouse.

Can't Find Data

- Click the Refresh icon
- Check the Filters
- Check procedure that was used by the user. (For example, looking for a document in the Orders tab)

Can't Sign-On

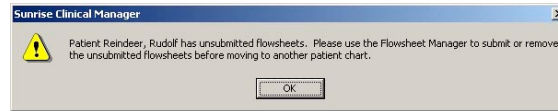
- Verify that the user is using the correct sign-on code and password.
- Verify that other users can sign-on to their computer.
- Move to another workstation (if available).
- Verify that the sign-on code and password are spelled correctly

Blank Screen

- Is the workstation plugged in?
- Is the workstation turned on?
- Is the workstation functioning?
- Check whether the power is on or off.
- Check for loose cable connections.

Unsaved Flowsheets

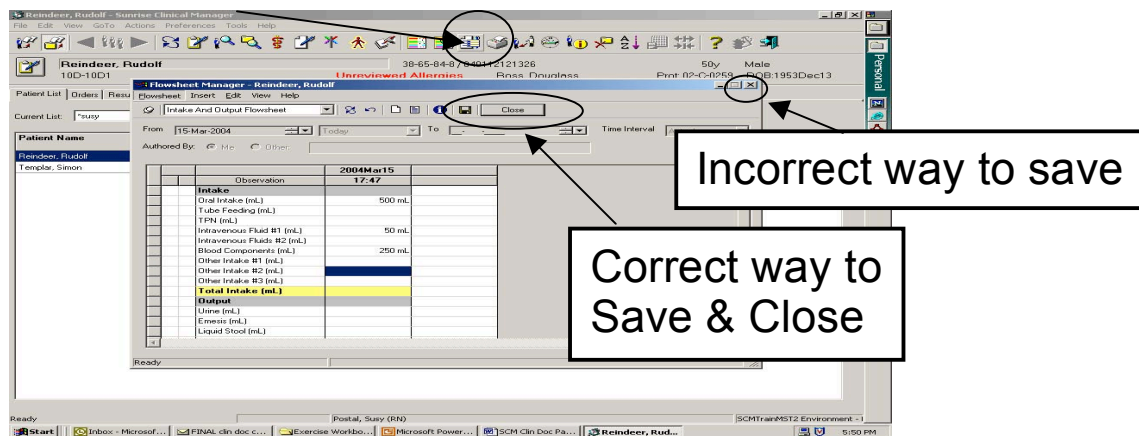
If you close a flowsheet incorrectly by selecting the X instead of the close button, the flowsheet will close without being saved. If you try to document on another patient, you will see this message:



Screen 1: Unsaved Flowsheet message

To resolve this, select the flowsheet manager. The unsaved flowsheet will display. Save and close the document correctly by clicking the close button. Now you are ready to move to another patient's chart.

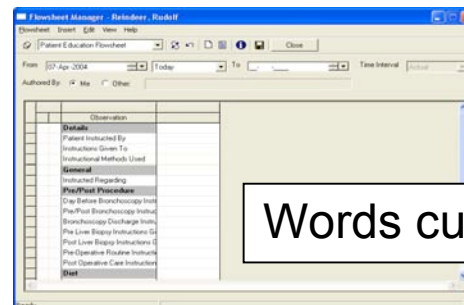
Flowsheet Manager



Screen 2: Save Flowsheet

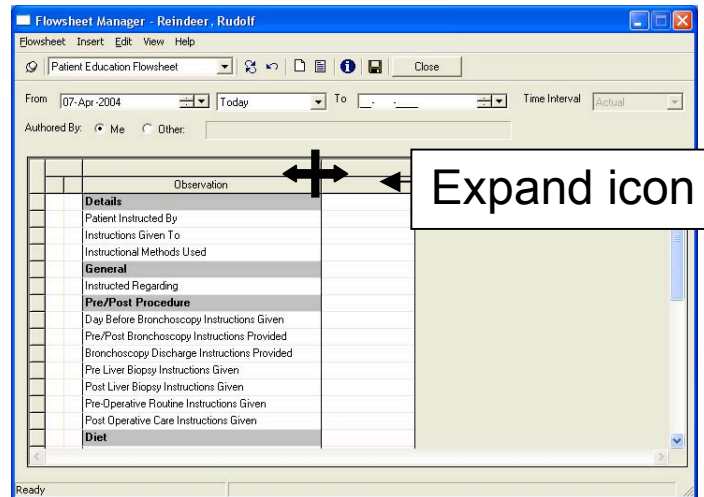
Expanding Columns on a Flowsheet

At times you may find that you can not read all the information in the column.



Screen 3: Flowsheet

To resolve this, widen the columns. Place your cursor over the right border of the column. When the cursor changes to a double headed arrow, left-click hold and drag the borders to the right. The column will expand.



Screen 4: Expand Column Icon

CRIS Website

<http://cris.cc.nih.gov>

Windows Skills Online Tutorial Website

http://www2dev.cc.nih.gov/crc/winnav/WinNav_content.html

Glossary of Terms

A

Activate Conditional Order

A user can enter an order with an attached condition (e.g. if temp > 100) and the order will be placed with a status "available for activation". Once the condition is met, the user has the ability to "activate" the order. When a condition placed on an order when it was submitted has been met, the order is processed using this function.

ADT

Admission, Discharge and Transfer. MIS will continue to be the system used to admit patients and maintain ADT information.

B

BSA

Body surface area

C

Complete Order (MIS)

Removes an order from the Medical Care Plan (MCP) and the current order summary. Some orders will self-complete when charted (e.g. a medication given one time), but others should be completed once they are fulfilled, charted, and no longer needed. No physician authorization required to complete an order.

Conditional Order (CRIS)

A user can enter an order with an attached condition (e.g. if temp > 100) and the order will be placed with a status "available for activation".

CPOE

Computer Prescriber Order Entry

CPRI

Computer-based Patient Record Institute. Their website is cpri-host.org

CPT

Current Procedural Terminology

CRIS

Clinical Research Information System. This name is also used for the core system replacing MIS functions.

D**Delete Order (MIS)**

Removes the order without necessarily stating per 'agent for'.

DICOM

Digital Imaging and Communications in Medicine (standards organization)

Discontinue/Cancel Order (CRIS)

Allows a user to discontinue one or more orders that were appropriate for a time, but no longer are. Also allows a user to cancel orders that were entered for the wrong patient. Note: Cancelled orders can be "Reinstated" when cancelled in error.

E**Eclipsys**

Vendor of Sunrise™ Clinical Manager (SCM) which is the CRIS applications

G**GUI**

Graphical user interface. The GUI allows the user to interact with the associated software program and generally consists of pictorial components such as icons, menus, toolbars, etc.

H**HIMSS**

Healthcare Information and Management Systems Society There web site is www.himss.org

HIPAA

Health Insurance Portability and Accountability Act

HIS

Hospital Information System

HL-7

Health Level Seven (standards organization). There web site is www.hl7.org

Hold Order (CRIS)

Physicians can enter orders in advance of the patient's admission. These pre-admit orders are then "HELD" in CRIS and must be activated when the patient is admitted. Nurses can activate HELD orders (inpatient only). In CRIS, the term "Suspend" has a totally different meaning than the current MIS description. In SCM an order can be 'suspended', for example if a patient is temporarily transferred off the unit and then once they return and order is needed again, it can be "unsuspended".

Hold Order (MIS)

Hides orders from active but does not discontinue.

I**ICD**

International Classification of Disease

Implementation of Change

While the CRIS Process Integration Team develops plans for implementing the accepted changes, actual implementation is by others identified in the implementation plan, using information passed on to them by the Process Integration Team.

ITIWG

Information Technology Infrastructure Working Group

J**JRP**

Joint Requirement Planning

L**LIS**

Laboratory Information System

LTD

Live Test Demonstration

M**Marked as Done**

Items on the worklist are “marked as done” by the user when the medication is administered, the patient has left on pass or discharge and/or the patient has been transferred. This marks the task as performed. This is in contrast to item status updated to “performed” or “results received” by an interface message, such as lab test.

MIS

Medical Information System

Modify Order (CRIS)

This function is used to add dispensing information to an order. No other modifications are allowed in the system. Users should discontinue and reorder as needed.

Modify Orders (MIS)

Changes a schedule on a medication or an ancillary department order (e.g. QID to Q6H). MIS will discontinue the original order and rewrite the new order with the new schedule.

MSHISM

Maryland Society of Healthcare Information Systems Management (Maryland chapter of HIMSS). Their website is www.mshims.org

N**NCA-HIMSS**

National Capital Area HIMSS chapter. Their website is www.himss-nca.org

O**Organizational Process**

One of a set of named standard processes identified by the Clinical Center or Institute organization.

P**PACS**

Picture Archiving & Communication System

PAM

Project Advisory Meeting

PMT

Project Management Team

Process

Defined sequence of activities performed by people or organizations acting in defined roles to achieve a specified end goal, service, or product.

Process Change Options

In the CRIS Core Process Integration Methodology, change decisions are arrived at only after involving stakeholders in a discussion of possible ways of resolving a group of process issues. This serves several purposes:

- the user view of the issue is usually the most accurate from the standpoint of understanding difficulties in changing work
- practices

- Users are in the best position to create minimum impact solutions when change is inevitable
- Building on concepts which users have helped to develop improves the likelihood that changes will be accepted

Process Issue

Situation that results from implementing some aspect of new CRIS Core functionality requiring a change to a work practice (process change).

Process Issue Resolution

Identifying and taking the necessary steps to ensure that changes in work practices necessitated by implementing CRIS functionality are accomplished with minimum risk to organizational effectiveness. Resolution steps may include obtaining approval of appropriate governance bodies, developing training in new work practices, communicating change expectations to affected groups, developing on-line assistance tools, revising standard policies and procedures, and briefing managers and users. In some cases, resolution may involve changing previous design decisions to accommodate operating practices for reasons of patient safety, regulatory compliance, or operational efficiency.

R**Release Hold Orders (CRIS)**

Physicians can enter orders in advance of the patient's admission. These pre-admit orders are then in a "hold" status in SCM and must be activated to remove them from HOLD mode when patient is admitted. In CRIS, the term "Suspend" has a totally different meaning than the current MIS description. In SCM an order can be 'suspended', for example if a patient is temporarily transferred off the unit and then once they return and order is needed again, it can be "unsuspended".

Renew Order (MIS)

Some accesses may allow for a renewal of an order, typically medication. Keeps the order ongoing.

Reorder (CRIS)

Allows for renewal/reorder of existing order with existing requestor or new requestor and ability to modify order parameters at this time, if necessary.

Reorder (MIS)

Used for supply situations and need for medication replacement.

Restart [Held] Order (MIS)

Orders held must be restarted (active)

RIS

Radiology Information System

S**Signing Orders**

Prescriber signs new orders entered on his/her behalf.

Status Orders (MIS)

Action taken to indicate that the test has been done, the results have not. With nursing collected specimens, it prints a requisition.

Suspend Order (CRIS)

Removes the orders from active status due to status change of patient (e.g. an active order that should be stopped when the patient goes on pass). An example would be all orders for a patient may be suspended while the patient is in OR, and later unsuspended when the patient returns to the nursing unit.

Suspend Order (MIS)

Physicians can enter orders in advance of the patient's admission. These pre-admit orders are then "suspended" in MIS and must still be activated to remove them from suspend mode when patient admitted. Nurses can activate suspended orders (inpatient only).